Project and Pipeline Status Report Instructions

Status formats that can be used to summarize and communicate to the team and to management the health of the overall project portfolio, as well as specific detailed status on one or more individual projects in the portfolio.

It includes two pages of overview status on devoted to specific projects and a page summarizing the health of the overall project pipeline or portfolio being executed.

This format ensures management can clearly see the true state of individual projects and the overall portfolio. The goal is to keep them properly informed about project progress, difficulties, and issues, by periodically getting the right kinds of information from the project manager. The reports should advise whether the project is on track to deliver its outcome as planned, and must highlight to management any place where their decision-making or direct help is needed.

1. Review the included status report formats and consider which would be more effective and appropriate in your environment. Pay attention to the type and level of detail suggested.

2. Adapt the templates for your projects.

   - Adjust columns and mix and match from the different formats if necessary to get the combination of information you want to report.

   - Where the formats include columns for metrics, consider what other metrics might be most useful for keeping an eye on your projects.

3. Try the report out by populating it and meeting with your manager or project sponsor. See what questions they ask; they might point to additional information you need to add, or show where your entries are not clear. Ask them for feedback on how well the report has communicated what they needed to know about the project and portfolio.

4. Update the report information and formats to address any issues raised in the review.

5. Start using it for regular reporting, and continue to look for opportunities to enhance the reports.

Contents of the Status Report

Project Pipeline Status Dashboard page	Provides an overview of all projects in the pipeline (or the portfolio of projects being executed), showing status and issues. This chart is presented first in order to summarize that status, and help focus everyone's attention on the projects that need management attention. Two alternative formats are provided. Both versions provide dashboard status of scope, schedule, resources, and quality for the portfolio. • The first format adds columns for more information on what phase the project is in and the nature of any schedule slips. • The second format instead provides more elaboration on the dashboard lights for scope, resources, etc. to highlight issues in these areas specifically for outsourced/offsite development.
Project Status Overview page(s)	Reports on activities and accomplishments in the prior period (e.g. week or month), current milestone status, and overall project health. Two alternative formats are provided. Both formats provide a dashboard-type indicator status of project health in scope, resources, schedule, and cost. • The first format also provides a narrative, bullet-form executive summary of results, what's working, challenges, and next steps. • The second format includes instead a metrics-oriented summary of performance in key areas such as issues closed. The specific fields shown in this example format are metrics useful for a project involving outside/offsite/offshore contractors
Project Status Table- Tasks/ Deliverables page(s)	Presents status for one or more phases of a project, with emphasis on reporting completion status of major tasks and deliverables. Two alternative formats are provided for this page. Both provide a dashboard-type indication of the health of the tasks/deliverables. • The first emphasizes listing problems and corrective actions planned for tasks in trouble. • The second format is focused on showing planned vs. actual start and end dates for the tasks or deliverables, and current level of completion.

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Administrative Information

Revision	Author	Date	Sections Affected	Change Summary
1.0		1/3/2009		

Current Version	1.0
Date	1/3/2009
Master Document Chapter Number	5
Document ID	170